



San Francisco Bay Area Conservancy Program

Third Draft 5-3-07

REQUEST FOR GRANT PROPOSALS

EDUCATIONAL, COMMUNITY-BASED, “HANDS-ON” HABITAT RESTORATION AND TRAIL BUILDING

June 2007

The Coastal Conservancy announces the availability of grants to public agencies and nonprofit organizations for educational, community-based, “hands-on” habitat restoration and/or trail building.

Introduction

The San Francisco Bay Area Conservancy Program (Bay Program), administered by the State Coastal Conservancy (Conservancy), is soliciting from public agencies and nonprofit organizations applications for grants for “hands-on”, educational, community-based projects involving habitat restoration or enhancement and/or trail building or improvements/enhancements located in the San Francisco Bay area, beginning in 2008. This competitive grant program designates highest priority to projects that:

- ♦ serve a large number of people and include underserved populations;
- ♦ provide a valuable environmental education experience;
- ♦ provide for regionally significant natural resource restoration and/or public access using sound project design; and
- ♦ enjoy a broad base of support from restoration and/or public access advocates and other community groups.

There are no established minimum or maximum grant amounts but the Conservancy anticipates that most grants will be no less than \$20,000 and no more than \$150,000. Funding will come from the California Safe Drinking Water, Water Quality and Supply, Flood Control, River and Coastal Protection Bond Act of 2006 (Proposition 84).

The Conservancy’s Bay program was established in 1998 to address the natural resource and recreational goals of the nine-county Bay Area in a coordinated and comprehensive way (Division 21 of the California Public Resources Code, Chapter 4.5). For more information about the Conservancy, the Bay Program, and how to apply for grants from the Conservancy for projects other than the types described in this solicitation, please see the Conservancy’s website at <http://www.scc.ca.gov>.

Applying for a Grant

Application Form

The attached application form may also be obtained from the Conservancy's website at www.scc.ca.gov, or upon request, through e-mail or regular mail. *Prospective applicants are advised to discuss their projects with Conservancy staff prior to submitting applications.*

Questions about the application process or other general questions may be directed to:

Jeff Melby,
Project Manager
Telephone: (510) 286-4088
E-mail: jmelby@scc.ca.gov

Submit applications (four hard copies and one electronic version) to:

Anna Schneider
San Francisco Bay Area Conservancy Program
Coastal Conservancy
1330 Broadway, 13th Floor
Oakland, CA 94612

Application Contents

Please submit four hard copies of the completed application form, including all exhibits (except any letters of support, which may be submitted at a later date). Please include a compact disk (CD) that contains your application saved as a Microsoft Word document, and any digital photos and maps saved as .jpg files. If you are unable to send a CD, please contact us to discuss alternate ways to submit your electronic files.

Maps and Photographs

All applications must include one or more clear photos of the project site(s) (both digital and hard copies) and at least two reproducible (8.5" by 11") maps (both digital and hard copies). The two maps should show the project location at regional and site scales.

- The regional map will clearly identify the project's location(s) in relation to prominent area features and significant natural and recreational resources, including regional trails and protected lands.
- The site-scale map will show the location of project elements in relation to natural and man-made features on-site or nearby.

Letters of Support

Applicants are strongly encouraged to provide letters of support for their project, including letters from key legislators. Support letters do not need to be submitted at the time of application. If Conservancy staff recommends that your project be awarded grant funds, any letters of support must be provided to the Conservancy project manager at least two weeks prior to the date of the Conservancy Board meeting at which the proposed project will be considered.

***San Francisco Bay Area Conservancy Program
Request for Grant Proposals – Educational, Hands-On, Habitat Restoration and Trail Building***

Support letters should be addressed to the Board Chair and sent to the Coastal Conservancy at 1330 Broadway, 13th Floor, Oakland, CA 94612. The Conservancy project manager should be copied on the letter (i.e., include as cc: Jeff Melby).

Submission Dates

Proposals received by ???, 2007 will be evaluated and ranked by a committee of Conservancy staff. Proposals may also be submitted thereafter, and will be evaluated and ranked by Conservancy staff as time permits and as funding is available.

Eligible Activities

The majority of the funds applied for must be used to fund physical, on-site, habitat restoration and/or trail building activities involving community members. A portion of the funds may be used for classroom or other offsite-based environmental education efforts that complement the restoration and/or trail building activities. Restoration projects must focus on one or more the Bay Area's major ecosystems, which may include ocean, bay, and/or upland resources (e.g., oak woodlands, salt marshes, sand dunes, riparian corridors). Trail building or improvement projects must involve regional trails or connections between urban populations and regionally significant recreational sites. Trail building projects may include trail amenities and services such as staging areas, signage, and other costs directly related to trail construction and implementation. The classroom or offsite activities should be designed to prepare the participants for the hands-on activities or educate them about the natural or cultural resources associated with the site(s).

Monitoring of a restoration site (either pre- or post-construction) is eligible provided that the data will be used in a meaningful manner, either by the entity/agency overseeing the restoration project's monitoring program or as part of a regional or national effort to collect monitoring data to advance the state of knowledge about restoration projects. Research, monitoring, and assessments will only be considered when tied to on-the-ground projects.

The project activities must take place in at least one of the nine Bay Area Counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma). Bay Area Counties means those counties in their entirety, including those portions that drain to the Pacific Ocean.

The project must involve a community, such as towns, neighborhoods, and schools. For projects involving schools, the program should, at a minimum, involve the entire school or involve many students from different schools and districts.

If the restoration and/or trail building activities would be on privately-owned land, the applicant's organization will be required to enter into an agreement sufficient to protect the public interest in any projects implemented under the Conservancy's grant, and to ensure that the applicant's organization has permission to implement and monitor the project on the owner's land.

Activities that are not eligible for Conservancy funding include:

- trail construction on private land where the trail has not been dedicated for permanent public use by an easement or other legal instrument;

- restoration projects on private land without appropriate legal agreements to protect the public's improvements;
- improvements on public land without the landowning agency's permission;
- improvements to local, neighborhood serving trails or parks;
- maintenance;
- educational programs (unless the educational programming is a relatively small component of the overall proposal that compliments the habitat restoration or trail building project)

Eligible Applicants

Public agencies and certain nonprofit organizations are eligible for funding. Eligible nonprofit organizations must exist under the provisions of Section 501(c)(3) of the Internal Revenue Code. Eligibility of nonprofit organizations is defined by whether an organization's articles of incorporation (and IRS letter) demonstrate that the organization's purposes are consistent with Division 21 of the Public Resources Code, the Coastal Conservancy's enabling legislation. If you need assistance assessing the eligibility of your nonprofit organization, please contact Jeff Melby before you fill out the application.

Project Selection

The project review and selection process begins with Conservancy staff reviewing applications based on their relative regional significance, consistency with the San Francisco Bay Area Conservancy Program's "*General Screening, Programmatic and Evaluation Criteria*" (Exhibit A, attached), the Conservancy's "*Project Selection Criteria and Guidelines*" (Exhibit B, attached), and with the purposes of available funding sources. Applicants may be contacted to provide additional information during the review process.

High priority projects are considered those that:

- ♦ Serve a large number of people and include underserved populations.
- ♦ Provide a valuable environmental education experience.
- ♦ Provide for regionally significant natural resource restoration and/or public access using sound project design.
- ♦ Enjoy a broad base of support from restoration and/or public access advocates and other community groups.

Conservancy staff will evaluate and rank project proposals, with possible input from individuals and/or technical experts with pertinent expertise from other governmental agencies, non-profit organizations, and other entities. Applicants who submit proposals by July 31, 2007 are anticipated to be notified of their projects' ranking by August 31, 2007. Projects selected for funding are subject to Coastal Conservancy Board approval of the staff recommendation. Project funding will not be available until after approval of the grant award by the Conservancy Board and execution of a funding agreement between the Conservancy and the grantee. The earliest possible Board meeting the project will be considered at is November 8, 2007. Applicants are required to provide staff with all pertinent information in a timely manner to ensure Board consideration. See attachment titled "*Applying and Meeting Requirements for Coastal Conservancy Grants: Supplemental Information*" (Exhibit C) for additional details.

Grant Amounts and Available Funding

There are no established minimum or maximum grant amounts but the Conservancy anticipates that most grants will be no less than \$20,000 and no more than \$150,000. The Conservancy will base the size of awards on project needs and benefits and competing demands for funds. Funds may be spent over a three-year period starting in 2008. Applicants must also provide evidence of matching funds which may include in-kind donations of labor.

The Conservancy anticipates making a total of \$1.5-2 million available through two grant rounds over the next five years. However, this grant program may change based on the results of the first grant round, changes in funds available, and changes in legislation governing the Conservancy's programs. The timing of the next grant round will depend on the results of this grant round; the next grant round is currently anticipated to be in the year 2010.

Funding Agreement

Upon Board approval grantees enter into an agreement with the Coastal Conservancy. This agreement describes the terms and conditions for Conservancy funding. Grantees should note that funding may only be provided to reimburse expenses incurred by grantees *after* execution of their contractual agreement with the Conservancy.

The agreement will require grantees to furnish supplemental information in addition to that provided in the grant application. Exhibit C ("Applying and Meeting Requirements for Coastal Conservancy Grants: Supplemental Information") outlines the kinds of additional information that will be required and the Conservancy's process and usual timeline for completing agreement documentation. Specific supplemental information needed will vary by type of project.

Please note, in particular, that the agreement will require a resolution from the applicant's governing body containing the following: (1) authority to submit the proposal; (2) authority to enter into a contract with the Conservancy; and (3) designation of the applicant's authorized representative. This resolution may be submitted after the application form, but if the applicant's governing board meets infrequently and the proposed project needs to begin very soon, it is advisable to schedule the request for the resolution with the grantee's board early in the application process.



***San Francisco Bay Area
Conservancy Program***

GRANT APPLICATION

APPLICANT INFORMATION

Applicant name (organization) _____

Address _____

Contact name _____

Telephone _____ Fax _____ E-mail _____

Federal Tax ID# _____

Signature _____ Date _____

PROJECT INFORMATION

Project title: _____

Project location(s): City(ies) _____

_____ County(ies) _____

Proposed starting date (in 2008) _____

Estimated completion date (3-year maximum) _____

Acreage (if relevant) _____

Trail Length (if relevant-miles or linear feet) _____

Stream Miles (if relevant-miles or linear feet) _____

Latitude (*e. g.*, 38.337094) _____

Longitude (*e.g.*, 122.589652) _____

Congressional District(s) _____ State Senate District(s) _____

Assembly District(s) _____

Project Elements Check one or more, if applicable.

- ☐ San Francisco Bay Trail or connections
- ☐ Bay Area Ridge Trail or connections
- ☐ California Coastal Trail or connections
- ☐ Trail connections between population centers and public facilities
- ☐ Recreational or educational facilities
- ☐ Watershed protection
- ☐ Restoration or enhancement of natural habitats or connecting corridors
- ☐ Other _____

Funding Request

Funding amount requested: _____

Month and Year funding needed to start project (not to begin before 2008): _____

Matching funds (not including in-kind):

\$ _____ Source _____ Expected commitment date: _____

\$ _____ Source _____ Expected commitment date: _____

\$ _____ Source _____ Expected commitment date: _____

\$ _____ Source _____ Expected commitment date: _____

\$ _____ Source _____ Expected commitment date: _____

\$ _____ Source _____ Expected commitment date: _____

TOTAL PROJECT COST: _____

Matching funds: In-kind

In-kind contributions include volunteer time and materials, bargain sales, and land donations. Please describe and estimate value, and differentiate between expected in-kind contributions and contributions (work or other types of contributions) already obtained/completed.

Preliminary Budget

In the budget matrix below, list the major tasks of the proposed project and indicate the estimated cost of each. These tasks should correlate with the activities you will list on the following page under "Timeline" (in some cases, several tasks listed here may logically be grouped as one activity in the timeline matrix). Show the source of funding for each task. Please note if any of these costs are donations or in-kind contributions. A simplified example is provided.

Simplified Sample Budget

Task Number	Task	Applicant's Funding	Coastal Conservancy Funding	Other Matching Funds	Total Cost
1	Organize offsite/classroom educational presentation	\$5,000			\$5,000
2	Complete restoration/trail design	\$5,000			\$5,000
3	Obtain Permits	\$5,000			\$5,000
4	Hands-On Activities	\$15,000	\$30,000	\$7,000 (in kind)	\$52,000
Total		\$30,000	\$30,000	\$7,000	\$67,000

*San Francisco Bay Area Conservancy Program
Grant Application Information, Form, and Exhibits*

Preliminary Budget

Task Number	Task	Applicant's Funding	Coastal Conservancy Funding	Other Matching Funds	Total Cost
Total					

Timeline

Please list (1) all significant and pertinent project milestones related to project for which funds are being requested (for example, California Environmental Quality Act compliance, obtaining of permits, commencement of construction, and project completion), (2) expected dates for reaching or completing those steps, and (3) any factors that could influence the timely implementation of the project.

Simplified Sample Timeline

Task Number and Task	Completion Date	Factors that Could Influence Timely Implementation
1. Organize offsite/classroom educational presentation	Nov. 2008	Scheduling
2. Complete restoration/trail design	March 2009	Lack of agreement on design
3. Obtain Permits	April 2009	Delays in issuing of permits
4. Hands-On Activities	May 2009	Potential delays above; weather

Timeline

Task Number and Task	Completion Date	Factors that Could Influence Timely Implementation

Project Description

Provide a clear, detailed description of project proposed for Conservancy funding. Please limit description to one page or less.

DRAFT

ADDITIONAL QUESTIONS

These questions will help us evaluate the consistency of proposals with Bay Program goals (see goal summary on page one of the Request for Grant Proposals, Exhibit A, and Exhibit B). Attach a separate page if necessary, but please keep responses brief.

1. Describe how the project is supported by, consistent with, or in conflict with any applicable local or regional plans. Identify the pertinent plan(s).
2. What public agencies, non-profit organizations, and other entities and individuals support the project and why?
3. Describe the regional significance of the project with respect to recreation and natural resources and how the project serves a regional constituency. Does it involve multiple jurisdictions? Describe enhancement or protection of wildlife habitat and connecting corridors, agricultural lands, watersheds, or trails.

4. Is the project related to any previous or proposed Coastal Conservancy projects? If so, which ones and how are they related?

I. Please answer the following questions about the project site(s) where community members will be participating in habitat restoration and/or trail building:

- a. Where is the site(s)? Please attach at least one map and photograph that clearly show the site(s) in relation to prominent area features and significant natural and recreational resources.
- b. Who is in charge of the project(s)? Who are other project partners and what are their roles?
- c. Please list a contact for the project(s), if different from the project applicant (name, organization, title, email, and phone):
- d. At what stage is the project(s)? Planning, design, construction, post-construction monitoring?

e. Is any portion of this project(s) required to mitigate the effects of another project?

g. Please provide a letter or other evidence from the property owner and/or project sponsor granting permission for the site to be used for applicant's program.

Please note: you may be asked to submit additional information about the project(s) including project designs, plans, California Environmental Quality Act (CEQA) analysis and permits.

II. Please answer the following questions about the educational component of the project:

a. Clearly describe what will actually be done by community members.

b. How will the community educationally benefit from this project?

c. Describe the project participants in detail (e.g., estimated number of students and teachers and/or community members, geographic locations, and demographic information).

d. Please describe your previous experience, if any, with environmental education, habitat restoration, trail building, and/or community-based projects.

*San Francisco Bay Area Conservancy Program
Grant Application Information, Form, and Exhibits*

Assurances

For construction projects, is the Project Lead Agency willing and able to maintain and operate the project for a period of at least 20 years?

Yes ☐

No ☐

Project Lead Agency possesses legal authority to nominate project and to finance, acquire and construct the proposed project, and has authorized the person identified as the official representative of the lead agency.

Project Lead Agency will develop a contingency plan to be in place in the event that backup funds are necessary to complete the project.

Project Lead Agency will maintain and operate the property acquired, developed, rehabilitated, or restored for the life of the resultant facility(ies), or for a period of at least 20 years. With the approval of the State Coastal Conservancy, the applicants or its successors in interest in the property may transfer the responsibility to maintain and operate the property.

Project Lead Agency will give the State Coastal Conservancy representatives access to and the right to examine all records, books, papers or documents related to the project.

Project Lead Agency will cause the work on the project to commence within a reasonable time after receipt of notification from the State Coastal Conservancy that the project has been approved to receive the grant. In addition, Lead Agency assures that the project will be carried to completion with reasonable diligence.

Project Lead Agency will comply where applicable with provisions of the California Environmental Quality Act, the National Environmental Policy Act, the Americans with Disabilities Act, the Secretary of the Interior's Standards and Guidelines for Archaeology and Historic Preservation, and any other federal, state, and/or local laws, rules and/or regulations, as applicable.

I certify that the information contained in this project application, including required attachments, is accurate and that I have read, understand and agree to the assurances on this form.

Signed _____
(Applicant Representative)

Date _____

Name and Title (printed) _____

Applicant Agency _____

EXHIBIT A



San Francisco Bay Area Conservancy Program

General Screening, Programmatic, and Evaluation Criteria

(from Chapter 4.5 of Division 21 of the Public Resources Code)

Screening Criteria

To be eligible for funding or other assistance through the San Francisco Bay Area Conservancy Program, projects must meet the following requirements:

- A. The project must be located in one or more of the nine Bay Area counties (Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, Sonoma)
- B. The project must help achieve one or more of the following four goals, and further comply with the noted qualifications:
 - 1. To improve public access to and around the bay, coast, ridgetops, and urban open spaces, through completion and operation of regional bay, coast, and ridge trail systems, and local trails connecting to population centers and public facilities, and through the provision and preservation of related facilities, such as interpretive centers, picnic areas, staging areas, and campgrounds.

Further Qualifications:

- a) Trail projects must be part of a regional trail system, which includes both major and connecting trails.
 - b) Trail projects must be consistent with locally and regionally adopted master plans and general plans.
 - c) Trail projects must be consistent with the rights of private property owners.
 - d) Trail projects may not have a significant adverse impact on agricultural operations and environmentally sensitive areas and wildlife, including wetlands and other wildlife habitats.
- 2. To protect, restore, and enhance natural habitats and connecting corridors, watersheds, scenic areas, and other open-space resources of regional importance.

*San Francisco Bay Area Conservancy Program
Grant Application Information, Form, and Exhibits*

3. To assist in the implementation of the policies and programs of the California Coastal Act of 1976 (Division 20, commencing with Section 30000), the San Francisco Bay Plan, and the adopted plans of local governments and special districts.
4. To promote, assist, and enhance projects that provide open space and natural areas that are accessible to urban populations for recreational and educational purposes.

Project Evaluation Criteria

- A. To what extent is the project supported by adopted local or regional plans?
- B. To what extent does the project involve multiple jurisdictions or serve a regional constituency?
- C. Can the project be implemented in a timely way?
- D. To what extent does the project provide opportunities or benefits that could be lost if the project is not quickly implemented?
- E. To what extent does the project include matching funds from other sources of funding or assistance?

EXHIBIT B



PROJECT SELECTION CRITERIA AND GUIDELINES

(Adopted January 24, 2001 by the
Board of the State Coastal Conservancy)

REQUIRED CRITERIA

- **Promotion of the Conservancy's statutory programs and purposes**
- **Consistency with purposes of the funding source**
- **Support** from the public
- **Location** (must benefit coastal resources or the San Francisco Bay region)
- **Need** (desired project or result will not occur without Conservancy participation)
- **Greater-than-local interest**

ADDITIONAL CRITERIA

- **Urgency** (threat to a coastal resource from development or natural or economic conditions; pressing need; or a fleeting opportunity)
- **Resolution of more than one issue**
- **Leverage** (contribution of funds or services by other entities)
- **Conflict resolution**
- **Innovation** (for example, environmental or economic demonstration)
- **Readiness** (ability of the grantee and others to start and finish the project timely)
- **Realization of prior conservancy goals** (advances previous Conservancy projects)
- **Return to Conservancy**
- **Cooperation** (extent to which the public, nonprofit groups, landowners, and others will contribute to the project)

EXHIBIT C



Applying and Meeting Requirements for Coastal Conservancy Grants: Supplemental Information

The "Request for Grant Proposals" provides important information about what is expected from the grantee in addition to the submission of a grant application. The following provides more detail about the **typical** process and possible associated costs and time commitment.

Generic Sequence of Activities After Submitting a Grant Application to the San Francisco Bay Area Conservancy Program

1. Bay Program staff review and rank applications to establish priorities for funding (see application for description of selection process). All projects must be authorized for funding by the governing board of the Coastal Conservancy (Board). Selected high priority projects may be presented to the Board as early as a few months after grantee is notified, or later depending on the project's readiness, urgency for funds, and availability of Conservancy staff.
2. A Conservancy Project Manager is assigned to the proposed project. He/she will contact the grantee to learn more about the project and arrange for a tour of the project site, if appropriate. The Project Manager will be the grantee's main contact at the Conservancy from the beginning to the end of the project.
3. The Project Manager writes a detailed Staff Recommendation for the Board's consideration, and includes letters of support gathered by the grantee as an exhibit to the report. The Staff Recommendation is reviewed by several Conservancy staff members, including the Bay Program Manager, an attorney, and the Executive Officer. An editor makes final preparations for each Staff Recommendation's inclusion in a CD that is sent to all Board members two weeks prior to a board meeting.
4. Board meetings take place about six to eight times each year and are held at various locations around the state. For each project, the Project Manager will make a brief presentation to the Board members. The Board generally votes on staff's recommendations at this same meeting.
5. Following Board approval, the Project Manager prepares a draft Grant Agreement. This Agreement is legally binding and includes requirements of the grantee and information about how and when funds can be disbursed. The draft Agreement is reviewed by the Bay Program Manager, a Conservancy attorney, and the Conservancy's contracts office. It can also be sent in draft form to the grantee. The process required to prepare and mail out a final agreement usually takes at least three weeks. Five copies of the final Agreement are sent to the grantee for signatures, and all five are sent back to the Conservancy. The Executive Officer signs each copy and one fully executed copy is sent back to the grantee.

It is important that the person administering the project for the grantee be familiar with the procedures and requirements of the agreement. It may be useful for the grantee to arrange a meeting with the Project Manager early in the project to review agreement conditions.

6. The Grant Agreement requires the grantee to prepare additional documents for the Executive Officer's review and approval before the project may begin (or, at least, before the parts of the

***San Francisco Bay Area Conservancy Program
Grant Application Information, Form, and Exhibits***

project for which the Conservancy will be asked to provide reimbursement may begin). Typical accompanying documents include:

- a work program that includes a budget and schedule of tasks to be completed
 - the names, titles, and pay rates of subcontractors, if any
 - a plan for signs acknowledging the Conservancy's contribution to the project
 - verification of adequate insurance
 - a resolution from the grantee's governing board
 - other legal documents that may require notarized signatures and recording
7. Once the Project Manager has received and the Executive Officer has approved all of the required additional documents and the Grant Agreement has been signed, the Project Manager will provide a written approval for the project to commence.
 8. Invoices can then be sent to the Conservancy for reimbursement of tasks specifically agreed upon in the Grant Agreement and its accompanying documents. A completed "Request for Disbursement" form (provided by the Project Manager, along with an instruction sheet) serves as an invoice. The invoices will be reviewed by the Project Manager and the contracts office. Payment will be mailed to the grantee usually within three weeks after the invoice is found to be complete. *Generally, the Conservancy is required to withhold ten percent of invoiced amounts until the project is satisfactorily completed.*
 9. At project completion, the grantee submits a final invoice for remaining project costs and withheld amounts along with a final summary report of the project. Upon the Project Manager's assessment that all requirements of the Grant Agreement have been met, the agreement is closed.

Non-Reimbursable Expenses: Expenses incurred before the contractual agreement with the Conservancy is completed are not reimbursable. Such expenses should be discussed with the Project Manager early in the application and agreement preparation phase if pre-agreement costs will be a problem for the grantee.

Other Time Commitments

1. Staff Recommendations usually include letters of support. Normally, the grantee takes responsibility for requesting and securing letters of support, including letters from key legislators.
2. A brief narrative explanation of project progress should accompany invoices.
3. The Project Manager will call or meet with the grantee from time to time to assess project progress.